

Common Services for Borrowers

Section L

Instructions, Conditions, and Notices to Offerors

Template

4 April 2003

Source Selection Information -- See FAR 2.101 and FAR 3.104

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This Template and Guide was developed using Microsoft Word 97. It is a tool to help you build your Section L - but cannot be used without careful editing. **You** must decide which parts apply to your particular situation, which ones should be deleted, and which must be tailored.

In addition to the separate guide itself, instructions and guidance are placed throughout the template as hidden text to help you decide which paragraphs to include and how to tailor them to your procurement. To view the Template & Guide without the hidden text, the button on the tool bar which shows non-printing characters (¶) must be deactivated. If the hidden text is still visible:

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CSB
SECTION L TEMPLATE and GUIDE

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1 **INSTRUCTIONS, CONDITIONS, AND NOTICES TO OFFERORS**

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3 **L-I - SOLICITATION PROVISIONS INCORPORATED BY REFERENCE**

4

5 **NOTICE:** Pursuant to FAR 52.252-1, "SOLICITATION PROVISIONS INCORPORATED BY

6 REFERENCE," the following provisions are incorporated herein by reference:

7

8 **A. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) SOLICITATION**

9 **PROVISIONS:**

10

PARAGRAPH	TITLE	DATE

11

12 **B. DEPARTMENT OF EDUCATION/FSA FEDERAL ACQUISITION REGULATION**

13 **SUPPLEMENT (if applicable) SOLICITATION PROVISIONS:**

14

PARAGRAPH	TITLE	DATE

1
2 **L-II - SOLICITATION PROVISIONS IN FULL TEXT**

3
4 **NOTICE:** The following provisions are hereby incorporated in full text:

5 **A. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) SOLICITATION**
6 **PROVISIONS:**

7
8
9
10 **B. DEPARTMENT OF EDUCATION/FSA FEDERAL ACQUISITION REGULATION**
11 **SUPPLEMENT (if applicable) SOLICITATION PROVISIONS:**

12
13
14
15 **C. ADMINISTRATIVE AND ONE-TIME USE PROVISIONS:**

16
17 (See your Acquisition Support Team specialist for approved
18 administrative provisions and/or assistance in drafting provisions to suit your specific
19 situation.)
20
21
22

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1 **L-III - INFORMATION TO OFFERORS (ITO)**
2 **and INSTRUCTIONS FOR PROPOSAL PREPARATION**

3 **1.0 Program Structure and Objectives**

4
5 ***1.1. Budget/Funding Information***

6 For consideration in developing your proposal, the program/budget funding is as
7 follows:

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2.0 General Instructions

(a) This section of the ITO provides general guidance for preparing proposals as well as specific instructions on the format and content of the proposal. The offeror's proposal must include all data and information requested by the ITO and must be submitted in accordance with these instructions. The offer shall be compliant with the requirements as stated in the Statement of Work (SOW), Statement of Objectives (SOO), System Specification, Contract Data Requirements List (CDRL), Model Contract. **Non-conformance with the instructions provided in the ITO may result in an unfavorable proposal evaluation.**

(b) The proposal shall be clear, concise, and shall include sufficient detail for effective evaluation and for substantiating the validity of stated claims. The proposal should not simply rephrase or restate the Government's requirements, but rather shall provide convincing rationale to address how the offeror intends to meet these requirements. Offerors shall assume that the Government has no prior knowledge of their facilities and experience, and will base its evaluation on the information presented in the offeror's proposal.

(c) Elaborate brochures or documentation, binding, detailed art work, or other embellishments are unnecessary and are not desired. Similarly, for oral presentations, elaborate productions are unnecessary and not desired.

(d) The proposal acceptance period is specified in Section A of the model contract/solicitation. The offeror shall make a clear statement in Section A of the proposal documentation volume that the proposal is valid until this date.

(e) In accordance with FAR Subpart 4.8 (Government Contract Files), the Government will retain one copy of all unsuccessful proposals. Unless the offeror requests otherwise, the Government will destroy extra copies of such unsuccessful proposals.

2.1 General Information

2.1.1. Point of Contact

The Contracting Officer (CO) is the **sole** point of contact for this acquisition. Address any questions or concerns you may have to the CO. Written requests for clarification may be sent to the CO at the address located in Section A of the model contract/solicitation.

2.1.2. Debriefings

The CO will promptly notify offerors of any decision to exclude them from the competitive range, whereupon they may request and receive a debriefing in accordance with FAR 15.505. The CO will notify unsuccessful offerors in the competitive range of the source selection decision in accordance with FAR 15.506. Upon such notification, unsuccessful offerors may request and receive a debriefing. Offerors desiring debriefing must make their request in accordance with the requirements of FAR 15.505 or 15.506, as applicable.

2.1.3. Discrepancies

If an offeror believes that the requirements in these instructions contain an error, omission, or are otherwise unsound, the offeror shall immediately notify the CO in writing with supporting rationale. The offeror is reminded that the Government reserves the right to award this effort based on the initial proposal, as received, without discussion.

2.1.4. Reference Library

A reference library has been established containing .
This library is located at .
The point of contact for the library is .
The library will be available .

2.1.5. Oral Presentation

Each offeror is requested to present the of its proposal in an oral presentation. Presentations will begin at at .
Subsequent presentations will be at .
The schedule will be repeated each weekday through or until presentations are completed.
No presentation may exceed and each offeror may be represented by no more than people.
copies of all briefing materials presented must be submitted with the written proposal submission. However, these materials will not be considered in the Government's evaluation of your proposal. Only the presentation itself will be evaluated.
The Government will notify offerors by phone, email, or FAX of the order of presentations by .
By the offeror must notify the Contracting Officer in writing of the name, phone, e-mail, and FAX number of the individual to whom the Government should give notice.

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2.2 Organization/Number of Copies/Page Limits

The offeror shall prepare the proposal as set forth in the Proposal Organization Table (Table 2.2 below). The titles and contents of the volumes shall be as defined in this table, all of which shall be within the required page limits and with the number of copies as specified in Table 2.2. The attachments identified in the table should be separately bound in three-ring, loose-leaf binders, as necessary. The contents of each proposal volume are described in the ITO paragraph as noted in the table below.

Table 2.2 - Proposal Organization

VOLUME	ITO Paragraph Number	VOLUME TITLE	COPIES	PAGE LIMIT/ GOAL
I		Executive Summary		
II		Requirements Capability		
III		Cost/Price		
IV		Contract Documentation		
V		Relevant Past and Present Performance		
etc.		(Tailor to insert titles of all Volumes and Attachments)		

2.2.1 Page Limitations

Page limitations shall be treated as maximums. If exceeded, the excess pages will not be read or considered in the evaluation of the proposal and (for paper copies) will be returned to the offeror as soon as practicable. Page limitations shall be placed on responses to ENs. The specified page limits for EN responses will be identified in the letters forwarding the ENs to the offerors. When both sides of a sheet display printed material, it shall be counted as 2 pages. Each page shall be counted except the following:

2.2.2 Cost or Pricing Information

All cost or pricing information shall be addressed ONLY in the Cost/Price Proposal and Contract Documentation Volumes. Cost trade-off information, work-hour estimates and material kinds and quantities may be used in other volumes only as appropriate for presenting rationale for alternatives or design and trade-off decisions.

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2.2.3 Classified Information

Where classified information is required in your response, it shall be provided as a classified supplement and bound in a single classified addendum to . Each entry in the classified addendum shall be referenced to the proposal volume, page number, and paragraph number to which it applies. Similarly, a reference shall be placed in the unclassified volume where the classified insert applies, giving the page and paragraph numbers within the addendum where it can be found. Binding shall conform to the same directions as those given in this ITO for unclassified portions. The classified addendum shall be separately bound with an applicable security designation color cover, conforming to the DD Form 254, and the Security Classification Guide provided in this solicitation. Pages in classified addenda will be included in the page count for the applicable volume. The classified addendum shall be submitted according to the applicable security regulations as follows .

2.2.4 Cross Referencing

To the greatest extent possible, each volume shall be written on a stand-alone basis so that its contents may be evaluated with a minimum of cross referencing to other volumes of the proposal. Information required for proposal evaluation which is not found in its designated volume will be assumed to have been omitted from the proposal.

Cross referencing within a proposal volume is permitted where its use would conserve space without impairing clarity. Cross referencing within a proposal volume is not permitted.

The offeror shall fill out the cross reference matrix at Attachment of this ITO indicating the proposal reference information as it relates to the ITO, SOO, CLIN numbers, and CDRL references found therein.

The offeror shall provide a cross reference matrix indicating, by ITO, SOO, and/or specification paragraph number, the corresponding proposal paragraph in that section which addresses the referenced item.

2.2.5 Indexing

Each volume shall contain a more detailed table of contents to delineate the subparagraphs within that volume. Tab indexing shall be used to identify sections.

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2.2.6 Glossary of Abbreviations and Acronyms

Each volume shall contain a glossary of all abbreviations and acronyms used, with an explanation for each. Glossaries do not count against the page limitations for their respective volumes.

2.3. Page Size and Format

(a) Page size shall be 8.5 x 11 inches, not including foldouts. Pages shall be . Except for the reproduced sections of the solicitation document, the text size shall be no less than point. Tracking, kerning, and leading values shall not be changed from the default values of the word processing or page layout software. Use at least 1 inch margins on the top and bottom and 3/4 inch side margins. Pages shall be numbered sequentially by volume. These page format restrictions shall apply to responses to Evaluation Notices (ENs).

(b) Legible tables, charts, graphs and figures shall be used wherever practical to depict organizations, systems and layout, implementation schedules, plans, etc. These displays shall be uncomplicated, legible and shall not exceed 11 by 17 inches in size. Foldout pages shall fold entirely within the volume, and . Foldout pages may only be used for large tables, charts, graphs, diagrams and schematics; not for pages of text. For tables, charts, graphs and figures, the text shall be no smaller than point.

2.4 Binding and Labeling

Each volume of the proposal should be separately bound in a three-ring loose leaf binder which shall permit the volume to lie flat when open. Staples shall not be used. A cover sheet should be bound in each book, clearly marked as to volume number, title, copy number, solicitation identification and the offeror's name. The same identifying data should be placed on the spine of each binder. All unclassified document binders shall have a color other than red or other applicable security designation colors. Be sure to apply all appropriate markings including those prescribed in accordance with FAR 52.215-1(e), Restriction on Disclosure and Use of Data, and 3.104-5, Disclosure, Protection, and Marking of Contractor Bid or Proposal Information and Source Selection Information.

2.5 Electronic Offers

For electronic copies, indicate on each diskette the volume number and title. Use separate files to permit rapid location of all portions, including exhibits, annexes, and

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1 attachments, if any. The offeror shall submit volumes through in electronic format,
2 using IBM-compatible, virus-free 3.5 inch high density diskettes with the "read only"
3 notch open . Each volume shall be on a different diskette. If files are compressed, the
4 necessary decompression program must be included. The electronic copies of the
5 proposal shall be submitted in a format readable by Microsoft (MS) Word 97, MS Excel
6 97, MS-Project 97, and MS-Power Point 97, as applicable.

7 **2.6 Distribution**

8 The "original" proposal shall be identified. Proposals shall be addressed to the
9 Contracting Officer and mailed to:
10 Be sure to advise the Administrative Contracting Officer (ACO) and the Defense
11 Contract Audit Agency (DCAA) for prime and subcontractors that the proposal is "For
12 Official Use Only" and "Source Selection Information--See FAR 3.104".

3.0 Volume I - Executive Summary

In the executive summary volume, the offeror shall provide the following information:

3.1 Narrative Summary

A concise narrative summary of the entire proposal, including significant risks, and a highlight of any key or unique features, excluding cost/price. The salient features should tie in with Section M evaluation factors/subfactors. Any summary material presented here shall not be considered as meeting the requirements for any portions of other volumes of the proposal.

3.2 Table of Contents

A master table of contents of the entire proposal.

4.0 Volume II – Requirements Capability Volume

4.1 General

The Requirements Capability Volume should be specific and complete. Legibility, clarity and coherence are very important. Your responses will be evaluated against the Requirements Capability subfactors defined in Section M, Evaluation Factors for Award. Using the instructions provided below, provide as specifically as possible the actual methodology you would use for accomplishing/satisfying these subfactors. All the requirements specified in the solicitation are mandatory. By your proposal submission, you are representing that your firm will perform all the requirements specified in the solicitation. It is not necessary or desirable for you to tell us so in your proposal. Do not merely reiterate the objectives or reformulate the requirements specified in the solicitation.

4.2 Format and Specific Content

4.2.1 Requirements Capability and Proposal Risk

Requirements Capability and Proposal Risk will be addressed in the Requirements Capability volume. In this volume, address your proposed approach to meeting the requirements of each Requirements Capability subfactor, as well as the risks in your proposed approach in terms of requirements capability/performance, cost, and/or schedule.

Address Proposal Risk by identifying those aspects of the proposal you consider to involve cost and/or requirements capability subfactor risk and classify each in accordance with AFFARS 5315.305(a)(3)(iii). Provide the rationale for each risk and its rating, including quantitative estimates of the impact on cost, schedule, and performance. Describe the impact of each identified risk in terms of its potential to interfere with or prevent the successful accomplishment of other contract requirements (for example: SOW or specification requirements), whether or not those requirements are identified as subfactors or elements. Suggest a realistic "work-around" or risk mitigator for identified risks that will eliminate or reduce risk to an acceptable level. Identify and classify any new risks introduced by such risk mitigation.

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4.2.2 Volume Organization

The Requirements Capability volume shall be organized according to the following general outline: Table of Contents

(2) List of Table and Drawings

(3) Glossary

(4) Cross Reference Matrix

(5) Subfactor One

(6) Subfactor Two (etc.)

(7) Risk Matrix

4.2.3 Sample Problem/Scenario

5.0 Volume III - Cost/Price Volume

5.1 General Instructions

5.1.1 Cost/Price Reasonableness and Realism

These instructions are to assist you in submitting information other than cost or pricing data that is required to evaluate the reasonableness of your proposed cost/price. Compliance with these instructions is mandatory and failure to comply may result in rejection of your proposal. Note that unrealistically low or high proposed costs or prices, initially or subsequently, may be grounds for eliminating a proposal from competition either on the basis that the offeror does not understand the requirement or has made an unrealistic proposal. Offers should be sufficiently detailed to demonstrate their reasonableness. The burden of proof for credibility of proposed costs/prices rests with the offeror.

5.1.2 Estimating Techniques and Methods

When responding to the Cost/Price Volume requirements in the solicitation, the offeror and associated subcontractors may use any generally accepted estimating technique, including contemporary estimating methods (such as Cost-to-Cost and Cost-to-Non-Cost Estimating Relationships (CERs), commercially available parametric cost models, in-house developed parametric cost models, etc.), to develop their estimates. If necessary, reasonable and supportable allocation techniques may be used to spread hours and/or cost to lower levels of the work breakdown structure (WBS).

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5.1.3 Non-Required Data

Data beyond that required by this instruction shall not be submitted, unless you consider it essential to document or support your cost/price position. All information relating to the proposed price including all required supporting documentation must be included in the section of the proposal designated as the Cost/Price volume. **Under no circumstances shall this information and documentation be included elsewhere in the proposal.**

5.1.4 Cost or Pricing Information Requirements

In accordance with FAR 15.403-1(b) and 15.403-3(a), information other than cost or pricing data may be required to support price reasonableness. Information shall be provided in accordance with FAR 15.403-5. If, after receipt of proposals, the CO determines that there is insufficient information available to determine price reasonableness and none of the exceptions in FAR 15.403-1 apply, the offeror shall be required to submit cost or pricing data.

5.1.5 Rounding

All dollar amounts provided shall be rounded to the nearest dollar. All loaded labor rates shall be rounded to the nearest penny.

5.2 Volume Organization

The cost/price volume shall consist of the following sections:

SECTION 1 - Table of Contents; summary descriptions of estimating, purchasing, and accounting systems; changes to estimating, accounting practices, or CAS Disclosure Statement.

SECTION 2 - Cost or pricing information and supporting data, to include estimating methodology.

SECTION 3 - Other information such as GFP/GFE, base support, long lead costs, termination costs, development/production schedule, inflation rate summary and explanation, life cycle cost, and special tooling/test equipment. List each exception to the ground rules and assumptions provided in the solicitation and each qualification of the cost/price volume, if any, and provide complete rationale.

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5.3 Estimating Methodology

5.3.1 Estimating System

Provide a summary description of your standard estimating system or methods. The summary description shall cover separately each major cost element (e.g., Direct Material, Engineering Labor, Manufacturing Labor, Indirect Costs, Other Direct Costs, Overhead, G&A, etc.). Also, identify any deviations from your standard estimating procedures in preparing this proposal volume. Indicate whether you have Government approval of your system and if so, provide evidence of such approval.

5.3.2 Purchasing System

Provide a summary description of your purchasing system or methods (e.g., how material requirements are determined, how sources are selected, when firm quotes are obtained, what provision is made to ensure quantity and other discounts). Also, identify any deviations from your standard procedures in preparing this proposal. Indicate whether you have Government approval of your system and if so, provide evidence of such approval.

5.3.3 Accounting System

Indicate whether you have Government approval of your accounting system and if so, provide evidence of such approval. Also, identify any deviations from your standard procedures in preparing this proposal.

5.3.4 Explanation of Estimating Methods Used

Explain the methodology used to estimate each cost element. As a minimum, provide the following information for each cost element. If a portion of the required information is not applicable for a particular cost element, so state.

5.3.4.1 Past Experience-Based Estimates

Where cost estimates are based upon past experience, identify the past experience, explain how the past experience relates to the current effort, including similarities and differences, and how cost data available from the past experiences was adapted to the current effort.

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5.3.4.2 Learning Curve Estimates

Where cost estimates are based upon learning/improvement curve applications, identify the specific area subject to learning, the curve hypothesis (unit or cumulative) and the slope of the curve as a percent. Also, identify the data used to develop the slope and explain how this data related to the current effort and how entry on the learning curve was attained (i.e., how the first unit cost was derived).

5.3.4.3 Engineering Labor Hours

If engineering labor hours have been estimated based upon other than past experience, provide detailed rationale on how they have been estimated.

5.3.4.4 Engineering Labor Hour Skill Mix

Explain how the proposed engineering labor hours skill mix has been derived and how the skill mix on this proposal compares with the overall plant skill mix. Explain why the cost element requires an average, higher, or lower than average skill mix, as applicable. If your normal estimating system uses a plant-wide average for proposal purposes, so state.

5.3.4.5 Manufacturing Labor Hours

If manufacturing labor hours have been estimated based upon other than past experience and/or learning curve application, provide detailed rationale on how they have been estimated. If standards were used, identify and explain how they were derived and state whether or not they have been used on other programs. If other than normal procedures were used to estimate manufacturing hours, explain.

5.3.5 Management Reduction

If estimated costs to perform the proposed effort have been decreased due to a management decision, provide a summary of the reduction by major cost element summary. Also provide complete rationale for the reduction.

5.4 Other Information

5.4.1 Commonality with Other Programs

Any cost reductions made in your proposal that are attributed to commonality with other programs, company-funded efforts, or capitalization of equipment must be supported with the following:

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(a) Commonality

- Identify the specific program(s) and why it is applicable.
- Address the cost allowability and allocability of this action per FAR and your CAS Disclosure Statement.

(b) Company-Funded Efforts

- Identify the specific efforts, the planned start and end dates, the applicability to the current solicitation, the source of company funding and how you plan to account for or allocate these costs in accordance with generally accepted accounting principles, and your CAS Disclosure Statement, if applicable.

(c) Capital Equipment

- Identify the specific item(s) capitalized and what other applications exist for the equipment, provide corporate approvals for each action, address the cost allowability and allocability of the action per the FAR and your CAS Disclosure Statement.

5.4.2 Funding Profile

Submit then-year funding requirements by type of funds, by Government fiscal year, supported by monthly/quarterly projections of expenditures, commitments, and termination expense. Note that the funding schedules must be consistent with any imposed Government budgetary constraints.

5.4.3 Cost Summary by Cost Elements

Provide a cost summary by major cost elements by CLIN using the format shown below:

Table 5.4.3 - Cost Summary by Cost Elements

COST ELEMENT	0001	0002	etc	TOTAL
Prime Hours				
Inter-divisional hours				
Subcontractor hours				
Total Hours				
Direct Labor				
Overhead				
Material				

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Subcontracts				
Interdivisional				
Other Direct Costs				
Subtotal				
G&A				
Estimated Cost				
Facility Capital Cost of Money				
Profit/Fee				
Total				

5.4.4 Person-Loading Schedule and Basis of Estimate

As a separate attachment to the cost/price volume, submit a person-loading schedule that is a summary of the total proposed hourly requirements by third WBS. These hourly requirements are to include (but separately identify) subcontractor(s) and inter-divisional transfer(s) hours. All hours shown in this attachment must agree with those reflected in the cost summary in Table 5.4.3 above. Also include the basis of estimate sheets supporting the proposed hours, materiel, and other direct costs in this attachment.

5.4.5 Schedule of Hours by Labor Skill Mix

Submit a schedule showing total proposed hours summarized by labor skill mix. This schedule is to include (but separately identify) subcontractor(s) and inter-divisional transfer(s) hours. In addition, provide labor classification statements for each category of labor proposed (prime, subcontracts, and inter-divisional) describing position qualifications (education, years of experience, etc).

5.4.6 Probable Subcontractors

Submit a listing of the proposed probable subcontractors and inter-divisional transfers showing (a) the supplier, (b) description of effort, (c) type of contract, (d) price and hours proposed by each, and (e) price and hours included in prime's proposal to the Government.

5.4.7 Major Material Items

Submit a listing of each major material item with an extended value exceeding showing nomenclature, part number, quantity required, unit price and extended price.

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1
2 5.4.8 Schedule of Rates

3 Submit a schedule showing proposed direct and indirect rates by year. This schedule is
4 to include (but separately identify) prime contractor, subcontractor, and inter-divisional
5 transfer rates.

6 5.4.9 Submission of Cost Models

7 The offeror is requested to submit an electronically encoded cost/price model in
8 support of their proposed price. Any cost/price model submitted must be consistent
9 with your approved estimating system and must duplicate the logic and mathematical
10 formula reflected in the paper copy of your proposal. Cost/price models submitted
11 must comply with the following format requirements:

12
13 (a) Data file should be submitted on a 3 1/2", double-sided/high density (1.44
14 Mb) diskettes.

15
16 (b) Data files/diskettes should be accessible by a Pentium compatible computer
17 running MS Windows 95 or later.

18
19 (c) Data file should be .XLS file format (MS-Excel 97 or earlier) compatible
20 format.

6.0 Volume IV - Contract Documentation

6.1 Model Contract/Representations and Certifications

The purpose of this volume is to provide information to the Government for preparing the contract document and supporting file. The offeror's proposal shall include a signed copy of the Model Contract, and Sections A through K. This includes:

6.1.1 Section A - Solicitation/Contract Form

Completion of blocks *(insert specific blocks)* and signature and date for blocks *(insert block number)* and *(insert block number)* of the *(insert form number such as the SF33)*. Signature by the offeror on the *(insert form number)* constitutes an offer, which the Government may accept. The "original" copy should be clearly marked under separate cover and should be provided without any punched holes.

6.1.2 Section B - Supplies or Services and Costs/Prices

Completed pricing information in Section B of the model contract.

6.1.3 Section F - Deliveries or Performance

Proposed delivery schedule. The offeror shall propose the delivery schedule by completing the blanks in Section F of the model contract. The proposed schedule is subject to the following guidance:

6.1.4 Section G - Contract Administrative Data

.

6.1.5 Section H - Special Contract Requirements

.

6.1.6 Section I - Contract Clauses

.

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6.1.7 Section K - Representations, Certifications, and other Statements of Offerors
Completed representations, certifications, acknowledgments and statements.

6.2 Exceptions to Terms and Conditions

Exceptions taken to terms and conditions of the model contract, to any of its formal attachments, or to other parts of the solicitation shall be identified. Each exception shall be specifically related to each paragraph and/or specific part of the solicitation to which the exception is taken. Provide rationale in support of the exception and fully explain its impact, if any, on the performance, schedule, cost, and specific requirements of the solicitation. This information shall be provided in the format and content of Table 6.2. Failure to comply with the terms and conditions of the solicitation may result in the offeror being removed from consideration for award.

Table 6.2 - Solicitation Exceptions

<i>SOLICITATION N Document</i>	<i>Paragraph/ Page</i>	<i>Requirement/ Portion</i>	<i>Rationale</i>
<i>SOO, SOW, SPEC Model Contract, ITO, etc.</i>	<i>Applicable Page and Paragraph Numbers</i>	<i>Identify the requirement or portion to which exception is taken</i>	<i>Justify why the requirement will not be met</i>

6.3 Other Information Required

6.3.1 Authorized Offeror Personnel

Provide the name, title and telephone number of the company/division point of contact regarding decisions made with respect to your proposal and who can obligate your company contractually. Also, identify those individuals authorized to negotiate with the Government.

6.3.2 Government Offices

Provide the mailing address, telephone and fax numbers and facility codes for the cognizant Contract Administration Office, DCAA, and Government Paying Office.

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Also, provide the name and telephone and fax number for the Administrative Contracting Officer (ACO).

6.3.3 Company/Division Address, Identifying Codes, and Applicable Designations

Provide company/division's street address, county and facility code; CAGE code; DUNS code; size of business (large or small); and labor surplus area designation. This same information must be provided if the work for this contract will be performed at any other location(s). List all locations where work is to be performed and indicate whether such facility is a division, affiliate, or subcontractor, and the percentage of work to be performed at each location.

6.3.4 Attachments to the Model Contract

The offeror shall provide the following as attachments to the model contract:

6.3.4.1 Subcontracting Plan

Include a Subcontracting Plan in accordance with FAR 19.702. The plan must be approved by the CO before contract award.

6.3.4.2 Participation of Small Disadvantaged Businesses

Pursuant to the requirements of FAR provision 52.219-24, each offeror must provide, with its offer, targets, expressed as dollars and percentages of total contract value, for SDB participation in any of the SIC Major Groups as determined by the Department of Commerce. The authorized SIC Major Groups are 10, 12 - 17, 22 - 31 34, 36 - 42, 44, 46 - 65, 67, 70, 73, 75, 76, 80, 82, 87, and 89. These SIC Major Groups are also posted at <http://www.arnet.gov/Reference/sdbadjustments.htm>. The targets may provide for participation by a prime contractor, joint venture partner, teaming arrangement member, or subcontractor; however, the targets for subcontractors must be listed separately.

6.3.4.3 Participation of Small Businesses (SB), Historically Black Colleges and Universities, or Minority Institutions (HBCU/MI)

If the offeror is other than a small business, the offeror shall submit a Small Business Subcontracting Plan in accordance with FAR 52.219-9 that also identifies and specifies the extent of offeror's commitment to the participation of small businesses (SB), historically black colleges or universities (HBCU) and minority institutions (MI), whether as joint venture members, teaming arrangement partners, or subcontractors. If applicable, submit a copy of your approved Master Plan. In the event the offeror has negotiated a comprehensive subcontracting plan pursuant to DFARS 219.702, the

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offeror must submit the information that identifies and specifies the extent of its commitment to the participation of SB, HBCU and MI.

6.3.4.4 Make or Buy

Include a Make or Buy Plan in accordance with FAR 15.407-2.

6.3.4.5 Government Furnished Property (GFP) Requirements

The Government plans to provide the items listed in Attachment of the solicitation as GFP. If the offeror requires the use of Government furnished items other than those specified, the offeror shall provide a listing including quantity, federal stock number, nomenclature, date needed and duration of availability, rental value per FAR 45.1 and 45.2, reason for need, and cross reference to cost/price volume paragraphs which pertain to GFP. The offeror shall also provide the written authorization from the cognizant ACO, as applicable. The offeror shall supply this information in the format shown in Table 6.3.4.3

Table 6.3.4.3 - Required Information for Using GFP/Base Support

<u><i>Quan- tity</i></u>	<u><i>Federal Stock #</i></u>	<u><i>Nomen- clature</i></u>	<u><i>Duration of Need</i></u>	<u><i>Rental Value</i></u>	<u><i>Reason for Need</i></u>	<u><i>Cross Ref. to Cost Prop</i></u>

6.3.4.6 Associate Contractor Agreements

Include Associate Contractor Agreements, if applicable.

6.3.4.7 Required Attachments

7.0 Volume V - Relevant Past and Present Performance

7.1 General

Each offeror shall submit a past and present performance volume with its proposal, containing past performance information in accordance with the format contained in Attachment __. This information is required on the offeror and all subcontractors, teaming partners, and/or joint venture partners proposed to perform __ per cent of the proposed effort based on the total proposed price, or perform aspects of the effort the offeror considers critical to overall successful performance. Offerors are cautioned that the Government will use data provided by each offeror in this volume and data obtained from other sources in the evaluation of past and present performance.

The offeror shall submit, along with the information required in this paragraph, a consent letter, executed by each subcontractor, teaming partner, and/or joint venture partner, authorizing release of adverse past performance information to the offeror so the offeror can respond to such information. For each identified effort for a commercial customer, offeror shall also submit a client authorization letter, authorizing release to the Government of requested information on the offeror's performance.

7.2 Early Proposal Information

Each offeror is requested to submit the information shown in Attachment __ for each relevant Government contract days prior to the date set for receipt of proposals. Failure to submit early proposal information will not result in offeror disqualification.

7.3 Relevant Contracts

Submit information in accordance with Attachment __: Past Performance Information on recent contracts that you consider most relevant in demonstrating your ability to perform the proposed effort. Also include information on recent contracts performed by each of your teaming partners and significant subcontractors that you consider most relevant in demonstrating their ability to perform the proposed effort. Include rationale supporting your assertion of relevance. For a description of the characteristics or aspects the Government will consider in determining relevance, see Section M, provision M002 - Evaluation Factors, paragraph M002e - Past Performance Factor. Note that the Government generally will not consider performance on a newly awarded contract

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1 without a performance history or on an effort that concluded more than years prior to
2 this source selection.

4 7.3.1 Specific Content

5 Offerors are required to explain what aspects of the contracts are deemed relevant to the
6 proposed effort, and to what aspects of the proposed effort they relate. This may include a
7 discussion of efforts accomplished by the offeror to resolve problems encountered on prior
8 contracts as well as past efforts to identify and manage program risk. Merely having
9 problems does not automatically equate to a little or no confidence rating, since the
10 problems encountered may have been on a more complex program, or an offeror may have
11 subsequently demonstrated the ability to overcome the problems encountered. The offeror
12 is required to clearly demonstrate management actions employed in overcoming problems
13 and the effects of those actions, in terms of improvements achieved or problems rectified.
14 This may allow the offeror to be considered a higher confidence candidate. For example,
15 submittal of quality performance indicators or other management indicators that clearly
16 support that an offeror has overcome past problems is required. Categorize the relevance
17 information into the specific Requirements Capability subfactors used to evaluate the
18 proposal.

20 7.3.2 Organizational Structure Change History

21 Many companies have acquired, been acquired by, or otherwise merged with other
22 companies, and/or reorganized their divisions, business groups, subsidiary companies,
23 etc. In many cases, these changes have taken place during the time of performance of
24 relevant present or past efforts or between conclusion of recent past efforts and this
25 source selection. As a result, it is sometimes difficult to determine what past
26 performance is relevant to this acquisition. To facilitate this relevancy determination,
27 include in this proposal volume a "roadmap" describing all such changes in the
28 organization of your company. As part of this explanation, show how these changes
29 impact the relevance of any efforts you identify for past performance evaluation/
30 performance confidence assessment. Since the Government intends to consider present
31 and past performance information provided by other sources as well as that provided
32 by the offeror(s), your "roadmap" should be both specifically applicable to the efforts
33 you identify and general enough to apply to efforts on which the Government receives
34 information from other sources.

ATTACHMENT 1: CROSS REFERENCE MATRIX

For Prospective Offerors: See paragraph 2.3.12.1 regarding instructions for completion of the solicitation Cross Reference Matrix. If this matrix conflicts with any other requirement, direction or provision of this solicitation, the other reference shall take precedence over this matrix. Additionally, to the extent this matrix discloses details as to the extent or manner by which the Government intends to evaluate offeror's proposals for award, Section M references in the matrix are for information purposes only and the Government shall be obligated to evaluate proposals solely in conformance with the provisions of the Section M of the solicitation.

An example of the format is shown below:

SOLICITATION CROSS REFERENCE MATRIX										
<i>REQ. DOC.</i>	<i>WORK REQ</i>	<i>WBS LEVEL</i>	<i>CLIN</i>	<i>Section L</i>	<i>Section M</i>	<i>Proposal</i>	<i>SOW</i>	<i>CDRL</i>	<i>IMP</i>	<i>SOO</i>
3.2.2	Design B	2	0001					N/A		
3.3.3	Build A	2	0002	3.B.2				A001		

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ATTACHMENT 2: PAST PERFORMANCE INFORMATION

Provide the information requested in this form for each contract/program being described. Provide frank, concise comments regarding your performance on the contracts you identify. Provide a separate completed form for each contract/program submitted. Limit the number of past efforts submitted and the length of each submission to the limitations set forth at paragraphs and , respectively, of Section L-III of this solicitation.

A. Offeror Name (Company/Division): _____
CAGE Code: _____
DUNS Number: _____

(NOTE: If the company or division performing this effort is different than the offeror or the relevance of this effort to the instant acquisition is impacted by any company/corporate organizational change, note those changes. Refer to the "Organizational Structure Change History" you provided as part of your Past Performance Volume.)

B. Program Title: _____

C. Contract Specifics:

1. Contracting Agency or Customer

2. Contract Number _____

3. Contract Type _____

4. Period of Performance _____

5. Original Contract \$ Value _____ (Do not include unexercised options)

6. Current Contract \$ Value _____ (Do not include unexercised options)

7. If Amounts for 5 and 6 above are different, provide a brief description of the reason

D. Brief Description of Effort as __Prime or __Subcontractor

(Please indicate whether it was development and/or production, or other acquisition phase and highlight portions considered most relevant to current acquisition)

E. Completion Date:

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1	1. Original date:	_____
2	2. Current Schedule:	_____
3	3. Estimate at Completion:	_____
4	4. How Many Times Changed:	_____
5	5. Primary Causes of Change:	_____
6		_____

F. Primary Customer Points of Contact: (For Government contracts, provide current information on all three individuals. For commercial contracts, provide points of contact fulfilling these same roles.)

1. Program Manager:	Name	_____
	Office	_____
	Address	_____
	Telephone	_____
2. Contracting Officer:	Name	_____
	Office	_____
	Address	_____
	Telephone	_____
3. Administrative Contracting Officer	Name	_____
	Office	_____
	Address	_____
	Telephone	_____

G. Address any technical (or other) area about this contract/program considered unique.

H. For each of the applicable subfactors under the Requirements Capability factor in Section M, illustrate how your experience on this program applies to that subfactor.

I. Specify, by name, any key individual(s) who participated in this program and are proposed to support the instant acquisition. Also, indicate their contractual roles for both acquisitions.

J. Include relevant information concerning your compliance with FAR 52.219-8, Utilization of Small Business Concerns, on the contract you are submitting.

K. Identify whether a subcontracting plan was required by the contract you are submitting. If one was required, identify, in percentage terms, the planned versus achieved goals during contract performance. If goals were not met, please explain.

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1 L. Describe the nature or portion of the work on the proposed effort to be performed
2 by the business entity being reported here. Also, estimate the percentage of the total
3 proposed effort to be performed by this entity and whether this entity will be
4 performing as the prime, subcontractor, or a corporate division related to the prime
5 (define relationship).

ATTACHMENT 3: PAST PERFORMANCE QUESTIONNAIRE

SOLICITATION NUMBER _____

1. Please complete this questionnaire. Handwritten responses are sufficient. If you need more space than that provided, please attach additional pages or write on the back. Responses will be treated as source selection sensitive information. Fax the completed questionnaire to:

XX-ALC/ZZK, ATTN: _____, Contracting Officer
Street Address
City, State and Zip

DSN phone: Commercial phone:
DSN fax: Commercial fax:

2. Explanation of codes:

<u>CODE</u>	<u>PERFORMANCE LEVEL</u>
E	EXCEPTIONAL - Performance meets contractual requirements and exceeds many <i>(requirements)</i> to the Government's benefit . The contractual performance of the element being assessed was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective.
V	VERY GOOD - Performance meets contractual requirements and exceeds some <i>(requirements)</i> to the Government's benefit . The contractual performance of the element being assessed was accomplished with some minor problems for which corrective actions taken by the contractor were effective.
S	SATISFACTORY - Performance meets contractual requirements. The contractual performance of the element being assessed contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory.
M	MARGINAL - Performance does not meet some contractual requirements. The contractual performance of the element being assessed reflects a serious problem for which the contractor has not yet identified corrective actions or the contractor's proposed actions appear only marginally effective or were not fully implemented.

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- 1
2 U UNSATISFACTORY - Performance does not meet most contractual requirements
3 and recovery is not likely in a timely manner. The contractual performance of
4 the element being assessed contains serious problem(s) for which the contractor's
5 corrective actions appear or were ineffective.
6 N NOT APPLICABLE - Unable to provide a score. Performance in this area
7 not applicable to effort assessed.
8

9 3. Please complete the following identifying information and past performance
10 assessment:
11

- 12 A. Contractor: _____
13 B. Contract number: _____
14 C. Period of Performance: _____
15 D. Negotiated price or cost at award: _____
16 E. Current estimated contract dollar amount: _____
17 F. Describe product acquired: _____
18 _____
19 _____
20

21 4. Circle the appropriate letter for each item on the questionnaire and provide
22 supporting narrative.
23

24 ASSESSMENT ELEMENTS

25 (1) Contractor's cost control. Did the contractor deliver at the agreed-to price/cost?
26 Describe the reasons for changes to contract value (e.g., scope changes,
27 overrun/underrun, Government-imposed schedule changes, etc.)
28

29 E V S M U N
30 _____
31 _____
32 _____
33 _____
34

35 (2) Did the contractor deliver according to the agreed-to schedule? What were the
36 causes of any schedule variances?
37

38 E V S M U N
39 _____
40 _____

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2

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1 (3) Did the product or service meet the end state vision requirement?
2

3 E V S M U N
4
5
6
7

8
9 (4) Did the product or service meet the required level of quality?
10

11 E V S M U N
12
13
14
15
16

17 (5) Did the contractor meet applicable goals for utilization of small, small
18 disadvantaged, woman-owned small business concerns, historically black colleges
19 and universities and minority institutions?
20

21 E V S M U N
22
23
24
25
26

27 (6) What is your overall rating of the contractor's performance?
28

29 E V S M U N
30
31
32
33
34

35 (7) Identify the contractor's overall strengths and weaknesses.
36
37
38
39
40

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1 (8) Given the choice, would you award to this contractor again?
2
3
4
5
6
7

8 (9) Are you aware of any other contracted efforts performed by this contractor similar
9 in nature to this contract? Please identify contract/program and point of contact.
10
11
12
13
14

15
16 (10) Is there anyone else we should send this questionnaire to? Please identify by
17 name, organization, and phone number.
18
19
20
21
22

23
24 (If more comment space needed, write on back, or attach pages.)
25

26 5. Please provide the name, title, address, and phone number of the person
27 completing this questionnaire.
28
29
30
31

32 Phone FAX
33

34 6. Thank you for your assistance in this source selection. If you have any questions,
35 please call at .
36

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ATTACHMENT 4: INTEGRATED PRODUCT DEVELOPMENT (IPD)

1.0 Program Structure and Objectives

The Government is implementing a streamlined approach based on Integrated Product Development (IPD) for this effort. This approach provides flexibility to the offeror in planning and executing an effective effort while giving the Government greater visibility into this effort. Two of the major features of this approach are reviewed in this introduction.

The first major feature addresses planning the contract work effort and preparing the contract documentation, see Figure 1. The Government's solicitation provides the offeror with the elements shown in the left column of the figure; i.e., Model Contract (Sections A - K), Section L, Section M, Performance Requirements, Statement of Objectives (SOO), Preliminary Work Breakdown Structure (PWBS), Applicable Documents (including Technical Requirements Document (TRD)), Contract Data Requirements List (CDRL), and Contract Line Item Numbers (CLINs). Based on the solicitation requirements, the offeror shall submit a proposal containing the items listed in the center column of the figure; i.e., a completed Model Contract, Contract WBS (CWBS), Statement of Work (SOW), Applicable Documents, an Integrated Master Plan (IMP) and Schedule (IMS), enhanced CDRL, and CLINs, in accordance with the detailed proposal preparation instructions found in this solicitation. The definitive contract contains the elements shown in the right hand column of the figure.

The IMP expands on the CWBS, its dictionary, and the SOW tasks, and establishes, by key events and selective narratives, the significant accomplishments and corresponding accomplishment criteria for both the products and processes necessary to accomplish the effort. Selected narratives will be included to explain where in the process the criteria apply. The IMP will be placed on contract. The IMS supports the IMP and shows the schedule of tasks necessary to achieve each significant accomplishment. The IMP and IMS will be used to track the progress of the effort, based heavily on the accomplishment criteria, which serve as measures of the progress. Detailed instructions on the preparation of the IMP and IMS are given below. A summary of these relationships for planning the contract work effort is shown in Figure 2.

The second major feature of the IPD approach is the use of Integrated Product Teams (IPTs) in implementing the event-driven plan described above. This approach involves a teaming of Government and contractor functional disciplines to integrate and

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1 concurrently apply all necessary processes to produce effective and efficient products
2 that satisfy end state vision requirements.

3
4 Under the IPD approach, the system is subdivided into its products. The program is then
5 organized into IPTs that are both empowered and held responsible for the performance
6 of their specific product. Each IPT is given the authority to manage their product and
7 allocate resources within the team. The IPT members represent all functions that have a
8 role in the performance of the product, e.g., engineers, manufacturing specialists, buyers,
9 contracting specialists, inspectors, and logisticians. The work tasking for each product is
10 defined in the offeror-proposed SOW and reflects the product-oriented CWBS. Analysis
11 and integration teams (AITs) ensure interactions between individual IPTs and serve to
12 integrate these individual products into a complete system. When interactions between
13 IPTs occur, it is appropriate to identify the particular item being shared and to establish
14 primary and secondary responsibilities between the involved IPTs, as illustrated in
15 Figure 2.
16

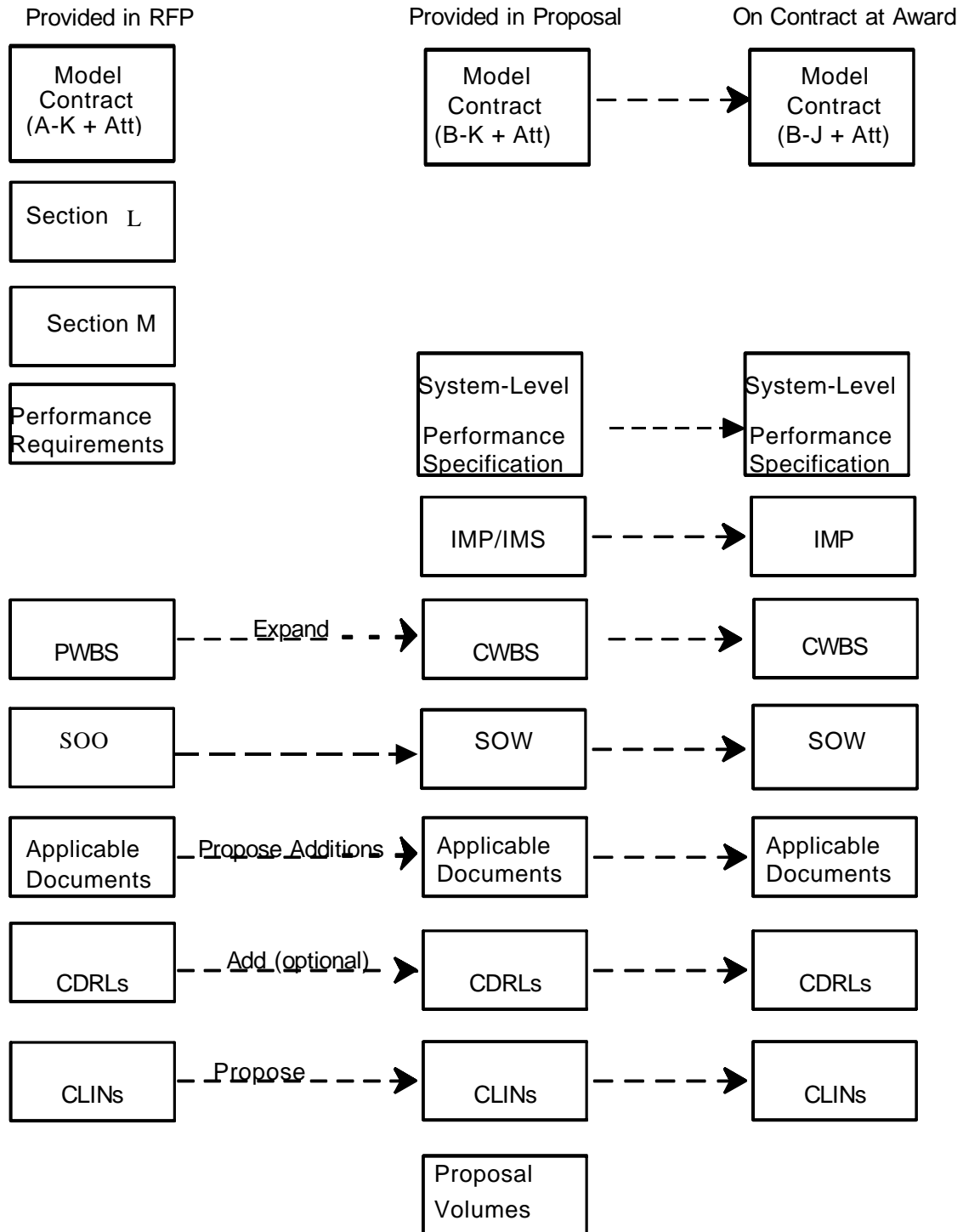


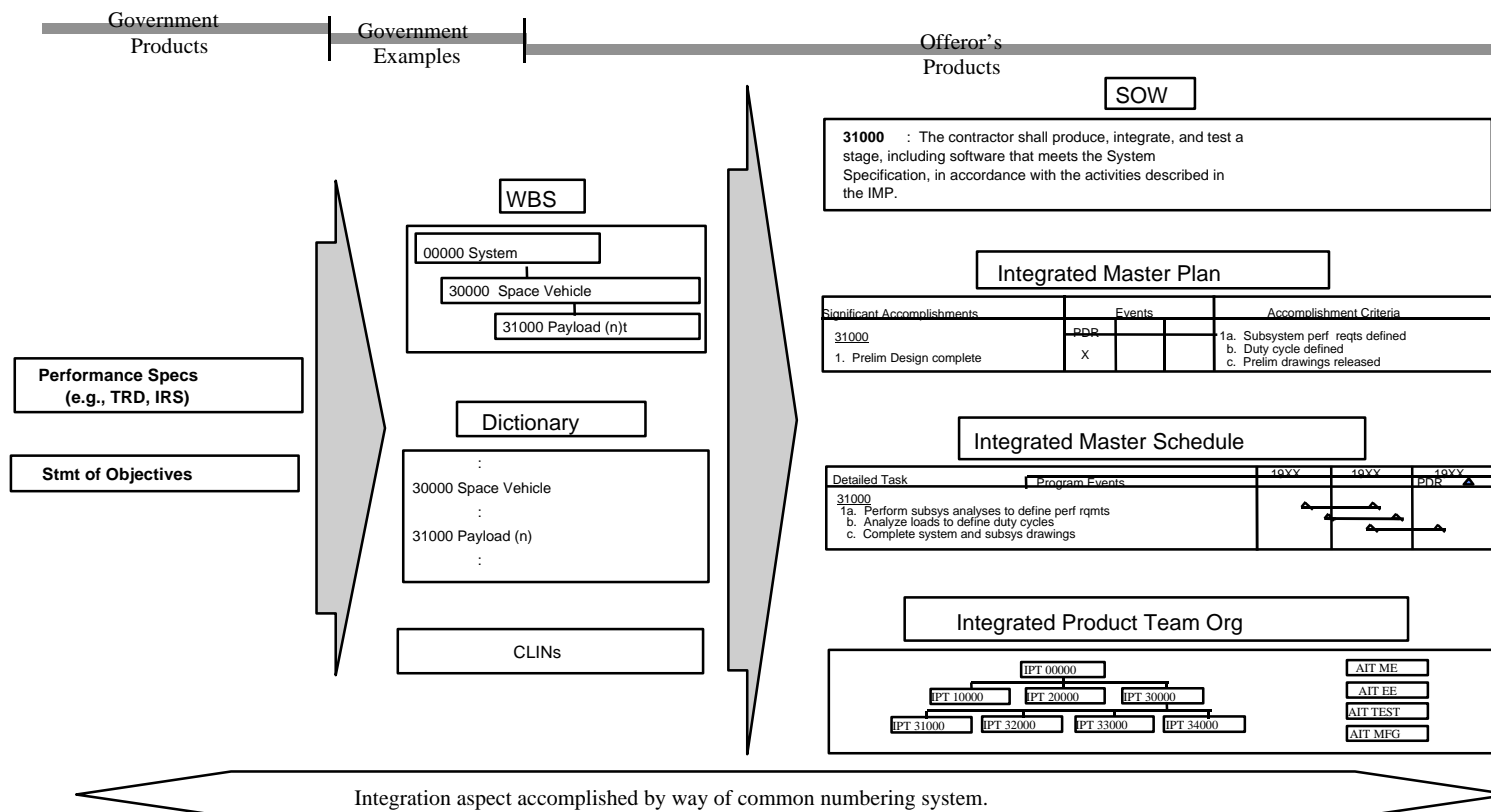
Figure 1. Procurement Approach

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Integrated Management Framework

Figure 2. Generic Example Showing Flow Down of Requirements from the Specification through the WBS and SOW to the IMP and IMS

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6.3.4.7.1 Contract Work Breakdown Structure (CWBS) and CWBS Dictionary

A Preliminary Work Breakdown Structure (PWBS) for the has been provided as Attachment to the solicitation. The reference document for developing the WBS and dictionary is MIL-HDBK-881. The offeror shall develop a Contract Work Breakdown Structure (CWBS) and dictionary, which reflects their view of the contract effort. The CWBS shall serve as the framework for organizing to include in-house, inter-divisional, subcontractor, and associate contractor activities. The offeror may add, rearrange and/or combine the PWBS elements shown in accordance with their approach, but supporting rationale shall be provided. The CWBS shall be developed to a depth (level) and breadth sufficient to accurately describe the offeror's understanding of the effort required for the as reflected in the SOW. The offeror's proposed CWBS and corresponding dictionary shall be provided as part of the model contract. The mapping of CLINs to WBS elements shall be completely consistent with that shown in Section B of the Model Contract.

6.3.4.7.2 Statement of Work (SOW)

A Statement of Objectives (SOO) is provided as Attachment to the solicitation. This SOO represents the Government's minimum objectives for the . The offeror shall use the SOO to propose a WBS-structured SOW which expands upon these minimum objectives to the extent necessary to conduct this acquisition. The proposed SOW shall define the tasks required for the ensuring all minimum requirements of the Government provided SOO and preliminary WBS have been addressed. The proposed SOW shall consist of tasking statements. Each tasking statement shall reference the CDRL items which will be delivered by that task. The proposed SOW shall not contain informational notes, as the Requirements Capability volume provides ample opportunity for discussion and description of the offeror's approach and the IMP and IMS provide the mechanisms for describing specific details of the offeror's approach. The tasking statements in the SOW, elements of the CWBS, and the IMP and IMS sections shall use a common numbering system, an example of which is shown in Figure 2. The proposed SOW, when accepted by the Government, will be put on contract at award.

6.3.4.7.3 Applicable Documents

A list of Applicable Documents has been provided to the offerors as an annex to the SOO/SOW attachment in the solicitation, which includes a minimum list of Government Compliance Documents. The offeror shall provide a list of any offeror, industry, commercial, and tailored Government standards, specifications, processes, and/or practices selected as compliance documents. The offeror shall also provide a list of all Government compliance documents intended to be used as compliance documents during the course of this contract. The offeror shall submit a list of these

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documents, including any tailoring instructions, as an annex to the proposed SOW. The offeror shall submit the completed Proposed Compliance Documents as a separately bound document.

6.3.4.7.4 Integrated Master Plan (IMP)

The purpose of the IMP is to demonstrate that the program is structured to minimize and control risk, to accomplish up-front summary planning and commitment, to provide a basis for subsequent detailed planning, to instill a balanced design discipline, to measure progress of program life-cycle requirements, and to provide management with in-process verification of requirements in order to make informed milestone decisions.

The IMP is an offeror-generated document, capturing the core activities and processes necessary to implement the program. The IMP shall be written as an event-based plan containing significant accomplishments and accomplishment criteria needed to successfully complete each major program milestone. IMP milestones shall be event-oriented and represent integrated product development (encompassing all functional disciplines) of the CWBS elements. The IMP measures program maturity by marking the initiation/conclusion of events/milestones, significant accomplishments, and associated completion criteria which describe the total work effort necessary to acquire a system which meets contract requirements. The IMP shall contain narratives that provide the Government a planning and management tool for providing additional insight into the offeror's total work effort and for addressing how the offeror will develop, implement, and commit to the total contracted effort.

The offeror's overall approach shall provide traceability from the system-level requirements (given in the system-level specification) through the offeror's CWBS and SOW to the IMP and IMS, and to the IPT organization. The IMP shall be a single plan for the entire effort, including associate and/or major subcontractor activities. There shall be an IMP section/subsection for each of the elements in the offeror's proposed CWBS, as linked to the SOW. Each section/ subsection of the IMP shall contain Events, Significant Accomplishments, Accomplishment Criteria, and selected Narratives as called for in the example SOW. The traceability to IPT organization allocates responsibility and accountability and should indicate primary and supporting IPTs.

a. Event: An IMP event is a key contractual or programmatic event defined by the Government or the offeror, which defines progress at a specific point in time. IMP events mark the conclusion/initiation of intervals of major program activity and serve as decision-oriented measures of program activity related to the program's maturity associated with continued system development. The offeror is encouraged to identify

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1 incremental reviews and milestones and additional events that best reflect the
2 proposed program approach. The offeror shall include definitions of each event at the
3 beginning of the IMP. IMP events shall be properly sequenced and may include
4 demonstration milestones, technical or program reviews and audits, and other key
5 decision points. For each IMP event, there shall be one or more entry or exit significant
6 accomplishments (either entry or exit).

7
8 b. Significant Accomplishment: Significant accomplishments are interim or final
9 critical efforts that must be completed prior to entering or exiting an event. Significant
10 accomplishments are organized first by the CWBS element/product and then by
11 functional area. Entry accomplishments reflect what must be complete to initiate an
12 event. Exit accomplishments reflect what must be done in order for the event to be
13 successfully closed and that is ready for the next event. For each significant
14 accomplishment, there shall be one or more accomplishment criteria. Significant
15 accomplishments include:

- 16
17 (1) A desired result at a specified event which indicates a level of design
18 maturity,
19 (2) A discrete step in a process,
20 (3) A description of interrelationship between different functional
21 disciplines.

22
23 The Government is seeking Significant Accomplishments that provide sufficient
24 insight to the process for achieving objectives of the SOO. The accomplishments shall
25 be sequenced in a manner that ensures a logical path is maintained throughout the
26 effort and tracks against key events.

27
28 c. Accomplishment Criteria: Measurable and useful indicators demonstrating
29 that the required level of maturity/progress in an associated significant
30 accomplishment has been achieved. Accomplishment criteria include:

- 31
32 (1) Completed work efforts,
33 (2) Activities which confirm the value of the technical parameters,
34 (3) Internal documents which provide results of in-process verification
35 (successfully completed analysis or other testing activities),
36 (4) Completion of critical activities required by the offeror's internal
37 program plans/operating instructions.

38
39 Accomplishment Criteria shall include the use of Technical Performance Measures
40 (TPMs) and metrics to track detailed tasking in the IMS. Preferably, the

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1 accomplishment criteria should avoid the use of ‘percent completed’, and avoid citing
2 data item report numbers rather than identifying and summarizing results.

3
4 d. Narratives: A collection of concise statements, with flow diagrams as
5 necessary, describing the offeror's key functional/management processes and
6 procedures. The IMP narrative is used to supplement IMP accomplishments and
7 associated criteria, provide insight into any SOW tasks not described by IMP
8 accomplishments /criteria, and implement the IPD process. In particular, a narrative
9 should provide enough information to identify where the accomplishment criteria
10 apply, (i.e., “pickoff points”) on the associated process. The narrative describes the
11 minimum essential processes that the offeror will apply to their products in
12 conformance with Government requirements.

13
14 The narratives shall complement the significant accomplishment and accomplishment
15 criteria by indicating where in the particular process the criteria apply. The concise
16 statements, in addition to describing the offeror's key functional/management
17 processes and procedures, shall describe their relationship to the IPD process and an
18 overview of the efforts required to implement them. The narrative shall address only
19 the key elements of implementing or developing a process/procedure (i.e. what the
20 process/procedure will be and how it will be implemented and tracked), since the
21 narrative will be included in the contract. The narrative is not the forum for providing
22 supporting information/rationale (i.e. why a particular approach has been taken).
23 Each narrative subject area shall be arranged in the following format: A. Objective; B.
24 Identification of Governing Documentation: and C. Process (if applicable). The
25 Objective is a brief statement of desired results, and is to be traceable to the SOO. The
26 Governing Documentation lists the Government documents and/or offeror practices
27 or procedures to be used to achieve the objective. The offeror shall clearly state
28 whether Government documents will be tailored further and reference in which of the
29 offeror's compliance documentation they will be tailored. The narrative shall be
30 consistent with applicable technical and management approaches described in the
31 Requirements Capability volume of the proposal.

32 33 **6.3.4.7.5 IMP Considerations**

34 a. The offeror shall include the following specific areas of Government interest
35 with narratives in the IMP (not listed in order of importance):

36 (1) Specialty Engineering Disciplines, (e.g. - R&M, System Safety, Human
37 Engineering, etc.)

38 (2) Integrated Logistics Support, including but not limited to training, tech
39 order publications, and NDI/COTS utilization and support

40 (3) Transition Planning

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- 1 (4) Configuration Management Planning and Transition Configuration
2 Management Planning
- 3 (5) Software development plan that identifies:
- 4 (i.) Integration between systems engineering processes and software
5 development processes.
- 6 (ii.) Assurance of software quality.
- 7 (iii.) DT&E and OT&E planning, including completion of the Verification
8 Cross Reference Matrix and participation in DT&E/IOT&E
- 9 (iv.) Internal and external interface and external interface
10 implementation, control planning and support for other AFSCN contractors,
11 as necessary
- 12 (v.) Development change control planning
- 13 (vi.) A plan for phase-in from predecessor to (insert program name)
- 14 (vii.) Planning for reduction of life cycle costs
- 15
- 16 b. Additionally, the offeror shall consider the following when preparing the
17 IMP:
- 18 (1) Failure and Deficiency Reporting, Analysis, and Corrective Action
- 19 (2) Government-Furnished Property Utilization
- 20 (3) System Security Engineering Management Planning
- 21 (4) System Safety/Health Risk Engineering, Environmental and Hazardous
22 Materials Management, and Hazard Status Reporting
- 23 (5) Quality program planning
- 24 (6) Planning for handling deviations and waivers
- 25 (7) Planning for information data exchange with Government
- 26 (8) Planning for subcontractor and associate contractor relationships
- 27

28 **6.3.4.7.6 Integrated Master Schedule (IMS)**

29 The intent of this section is to obtain a functionally integrated understanding of the
30 proposal with clear tracks between the technical, cost, schedule, management, etc., in a
31 way that provides the Government confidence that the program is structured to be
32 executable for the resources indicated. The IMS is a detailed task and timing of the
33 work effort in the IMP and is used as the primary tracking tool for technical and
34 schedule status.

35

36 The IMS is an integrated and networked multi-layered schedule of program/project
37 tasks. The IMS identifies all IMP events, accomplishment, and criteria and the expected
38 dates of each. These dates are based on the calendar dates provided as the starting
39 point and the logical flow of dates provided by calculating the addition of duration of

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1 all tasks using typical schedule networking tools. The IMS tasks will be directly
2 traceable to the WBS, IMP, SOW, and CLINs.

3
4 The offeror shall provide a top-level IMS as part of the proposal submittal. The more
5 detailed levels of the IMS, as well as updates, will be submitted after contract award as
6 a CDRL deliverable. The IMS is intended as a tool for day-to-day tracking of the
7 program/project that rolls up to increasingly higher summary levels. All
8 tasks/activities in the IMS should be logically linked together showing
9 predecessor/successor relationships. The activities and tasks will be sufficient to
10 account for the entire program under contract. Key elements of the IMS include:

11
12 (a) Milestone/Event - A specific definable accomplishment in the
13 program/project network, recognizable at a particular point in time.

14
15 (b) Activity or Task - A time consuming element, e.g., work in progress between
16 interdependent events, represented in an activity box. Activities are numbered and are
17 contained within an activity box. The left side represents the beginning of the activity,
18 and the right side is the completion of the activity.

19
20 (c) Duration - The length of time estimated to accomplish an activity
21 (disregarding the "calendar impact"). Rationale should also be provided supporting
22 the derivation of the durations including ground rules and assumptions (e.g., historical
23 data, experience on similar efforts, vendor schedules, number of work days per week,
24 number of shifts, company holidays) In addition, the offeror shall provide a supporting
25 narrative for the network diagram that explains the basis for the estimated durations of
26 those activities on the critical path(s) and for activities designated as high risk. Any
27 unusual aspects of their proposed approach to the program shall also be described.

28
29 (d) Constraint - A line that defines how two activities or events are logically
30 linked.

31
32 (1) Finish-to-Start (FS) - An activity must finish before another can start. The
33 offeror shall provide a brief narrative for all activities that do not have FS
34 relationships and how the respective relationship was determined and the lead
35 or lag estimated.

36
37 (2) Start-to-Start (SS) - An activity depends on the start of another activity

38
39 (3) Finish-to-Finish (FF) - One activity cannot finish until another activity
40 finishes.

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(4) Start-to- Finish (SF) - An activity cannot finish until another activity starts.

(5) Per cent Complete or Lead Lag

(e) Total Slack or Float - Extra time available on an activity before it will impact another activity on the critical path

(f) Free Slack or Float - Extra time available on an activity before it will impact an activity on another successor activity.

(g) Lead - The amount of time of the overlap between where a successor task begins and a predecessor task completes.

(h) Lag - The amount of time between the end of a predecessor task and the beginning of a successor task.

(i) Critical Path - A sequence of activities in the network that has the longest total duration through the program/project. Activities along the critical path have zero or negative slack/float. It should be easily distinguished on the report formats.

(j) Target Start (TS) - Date when an activity should start.

(k) Target Complete (TC) - Date when an activity should finish.

(l) Actual Start (AS) - Actual start date of an activity.

(m) Actual Finish (AF) - Actual finish date of an activity.

(n) Early Start (ES) - The earliest date an activity can start.

(o) Early Finish (EF) - The earliest date an activity can end.

(p) Late Start (LS) - The latest date an activity can start without delaying the program/project target completion date.

(q) Late Finish (LF) - The latest finish date an activity can have without affecting the program/project target completion date.

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1 (r) Gantt Chart - A graphical display of program activities and key milestones
2 that depict work activities in an integrated fashion. Represent activities by bars
3 showing the length of time for each activity.
4

5 The offeror shall also provide a resource-loaded Gantt chart for all high risk areas in
6 the program; including separate charts for critical subcontract efforts. In addition, the
7 offeror shall provide resource-loaded schedules for other risk areas that are unique to
8 their proposal based on offeror's analysis. For each of these high-risk areas, the offeror
9 shall provide minimum and maximum durations for the summary-level activity/WBS.
10 The resource loading shall be represented by functional hours for labor and by material
11 content. These hours shall be time phased by quarter with a recurring/non-recurring
12 breakout for each quarter using the attached resource loaded Gantt chart.
13
14
15